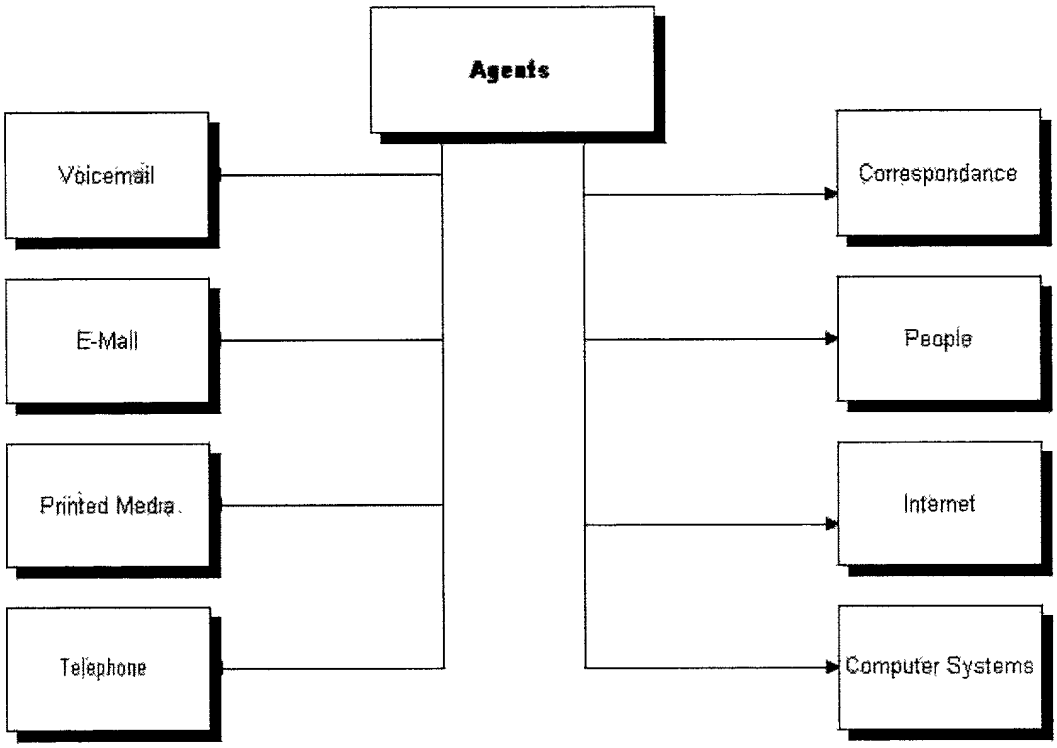

Agents
Voicemail
E-Mail
Printed Media
Telephone
Correspondance
People
Internet
Computer Systems

FIG. 1

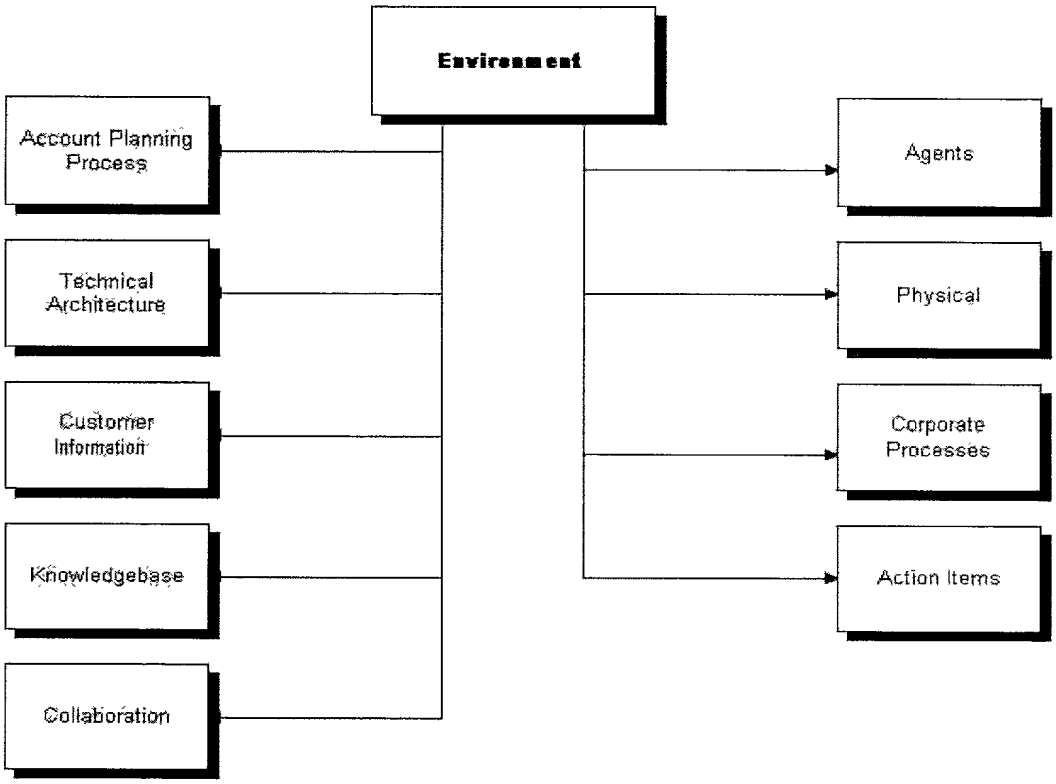

Environment
Account Planning Process
Technical Architecture
Customer Information
Knowledgebase
Collaboration
Agents
Physical
Corporate Processes
Action Items

FIG. 2

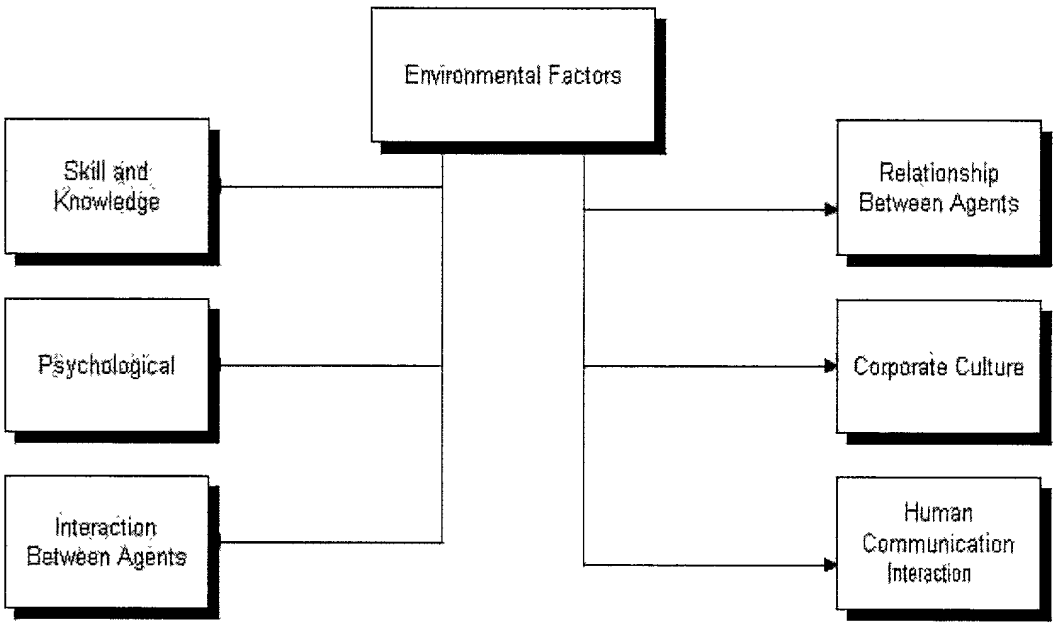
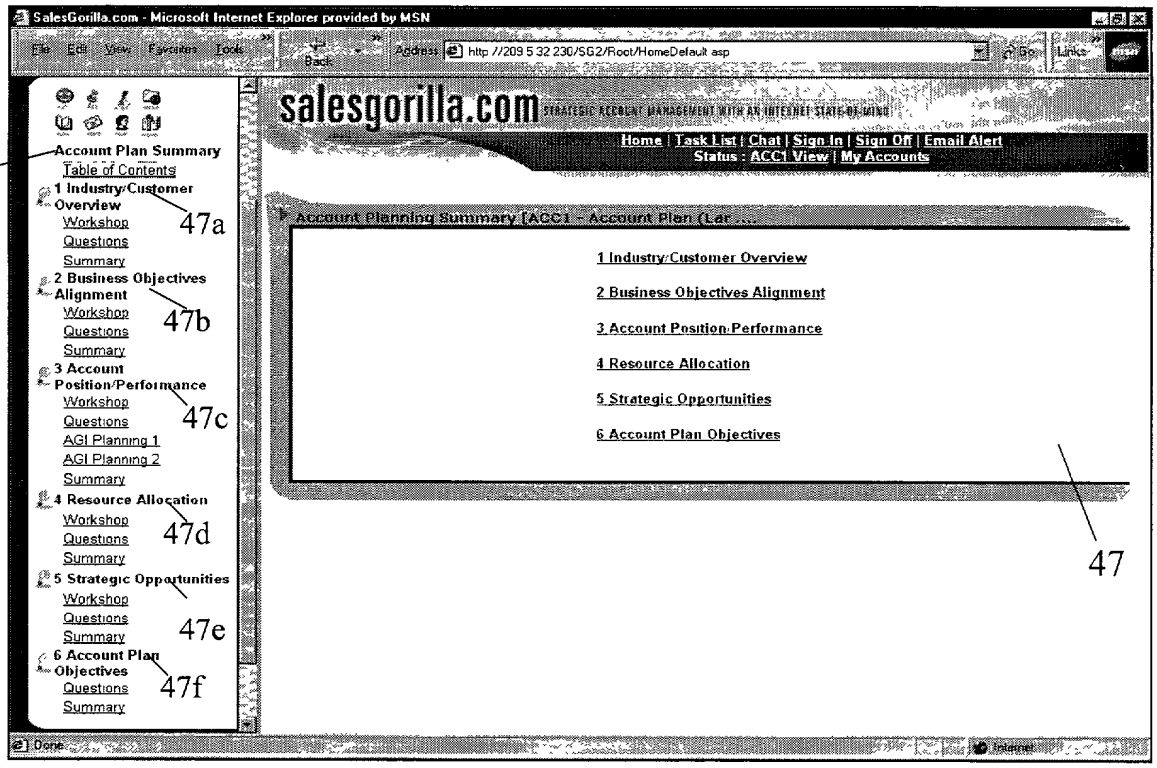

Environmental Factors
Skill and Knowledge
Psychological
Interaction Between Agents
Relationship Between Agents
Corporate Culture
Human Communication Interaction

FIG. 3


SalesGorilla.com - Microsoft Internet Explorer provided by MSN
salesgorilla.com
Home | Task List | Chat | Sign In | Sign Off | Email Alert
Status : ACC1 View | My Accounts
Account Plan Summary
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Workshop
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Summary
5 Strategic Opportunities
Workshop
Questions
Summary
6 Account Plan Objectives
Questions
Summary
Account Planning Summary [ACC1 - Account Plan (Lar ...
1 Industry/Customer Overview
2 Business Objectives Alignment
3 Account Position/Performance
4 Resource Allocation
5 Strategic Opportunities
6 Account Plan Objectives
45
47a
47b
47c
47d
47e
47f
47

FIG. 4

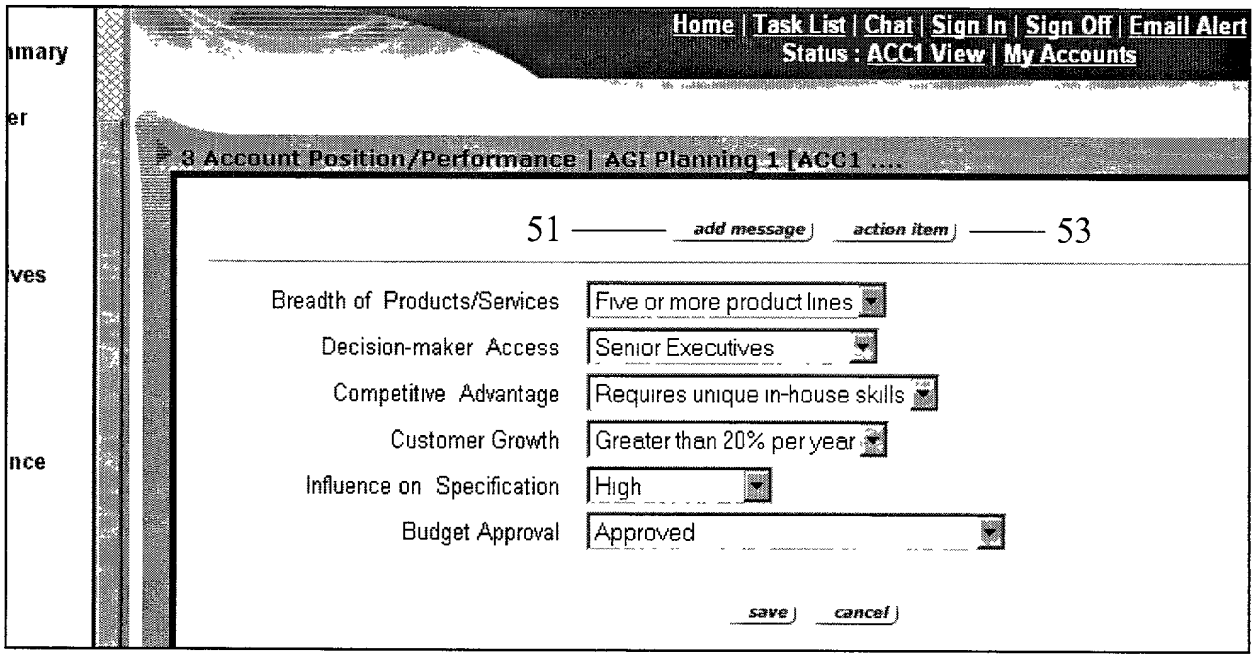

Home | Task List | Chat | Sign In | Sign Off | Email Alert
Status : ACC1 View | My Accounts
3 Account Position/Performance | AGI Planning 1 [ACC1 ...
51
add message
action item
53
Breadth of Products/Services
Five or more product lines
Decision-maker Access
Senior Executives
Competitive Advantage
Requires unique in-house skills
Customer Growth
Greater than 20% per year
Influence on Specification
High
Budget Approval
Approved
save
cancel

FIG. 5

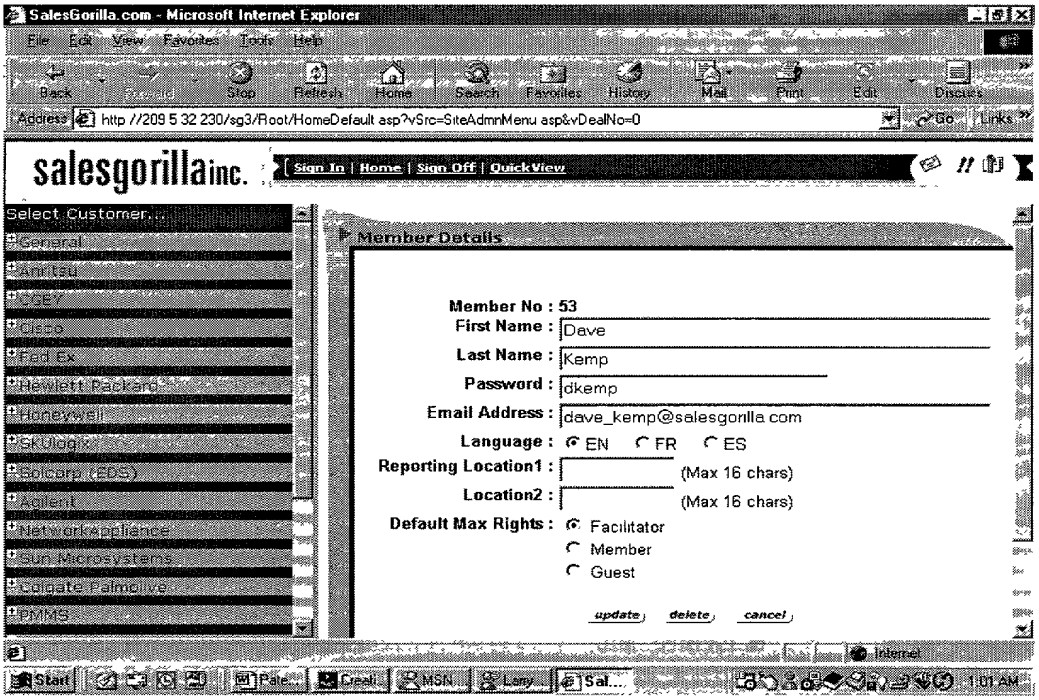

SalesGorilla.com - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss
Address http://209.5.32.230/sg3/Root/HomeDefault.asp?vSrc=SiteAdmnMenu.asp&vDealNo=0
Go Links
salesgorilla inc.
Sign In | Home | Sign Off | QuickView
Select Customer...
General
Anritsu
Cisco
Fed Ex
Hewlett Packard
Honeywell
Schlumberger
Solcorp (EDS)
Agilent
Network Appliance
Sun Microsystems
Colgate Palmolive
PMMS
Member Details
Member No : 53
First Name : Dave
Last Name : Kemp
Password : dkemp
Email Address : dave_kemp@salesgorilla.com
Language : EN FR ES
Reporting Location1 : (Max 16 chars)
Location2 : (Max 16 chars)
Default Max Rights : Facilitator
Member
Guest
update delete cancel
Internet
Start
1:01 AM

FIG. 6

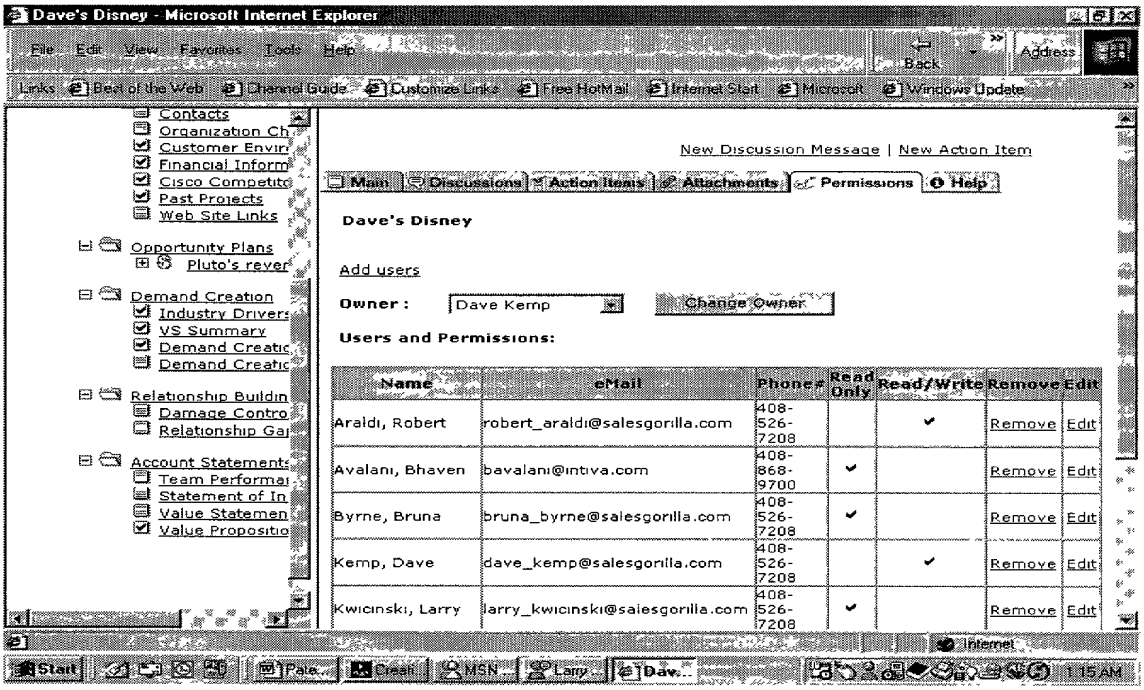

Dave's Disney - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Address
Links Best of the Web Channel Guide Customize Links Free HotMail Internet Start Microsoft Windows Update
Contacts
Organization Ch
Customer Envir
Financial Inform
Cisco Competito
Past Projects
Web Site Links
Opportunity Plans
Pluto's rever
Demand Creation
Industry Drivers
VS Summary
Demand Creatic
Demand Creatic
Relationship Buildin
Damage Contro
Relationship Ga
Account Statements
Team Performa
Statement of In
Value Statemen
Value Propositio
New Discussion Message | New Action Item
Main Discussions Action Items Attachments Permissions Help
Dave's Disney
Add users
Owner : Dave Kemp Change Owner
Users and Permissions:
Name | eMail | Phone # | Read Only | Read/Write | Remove | Edit
Araldi, Robert | robert_araldi@salesgorilla.com | 408-526-7208 | | ✔ | Remove | Edit
Avalani, Bhaven | bavalani@intiva.com | 408-868-9700 | ✔ | | Remove | Edit
Byrne, Bruna | bruna_byrne@salesgorilla.com | 408-526-7208 | ✔ | | Remove | Edit
Kemp, Dave | dave_kemp@salesgorilla.com | 408-526-7208 | | ✔ | Remove | Edit
Kwicinski, Larry | larry_kwicinski@salesgorilla.com | 408-526-7208 | ✔ | | Remove | Edit
Internet
Start
1:15 AM

FIG. 7

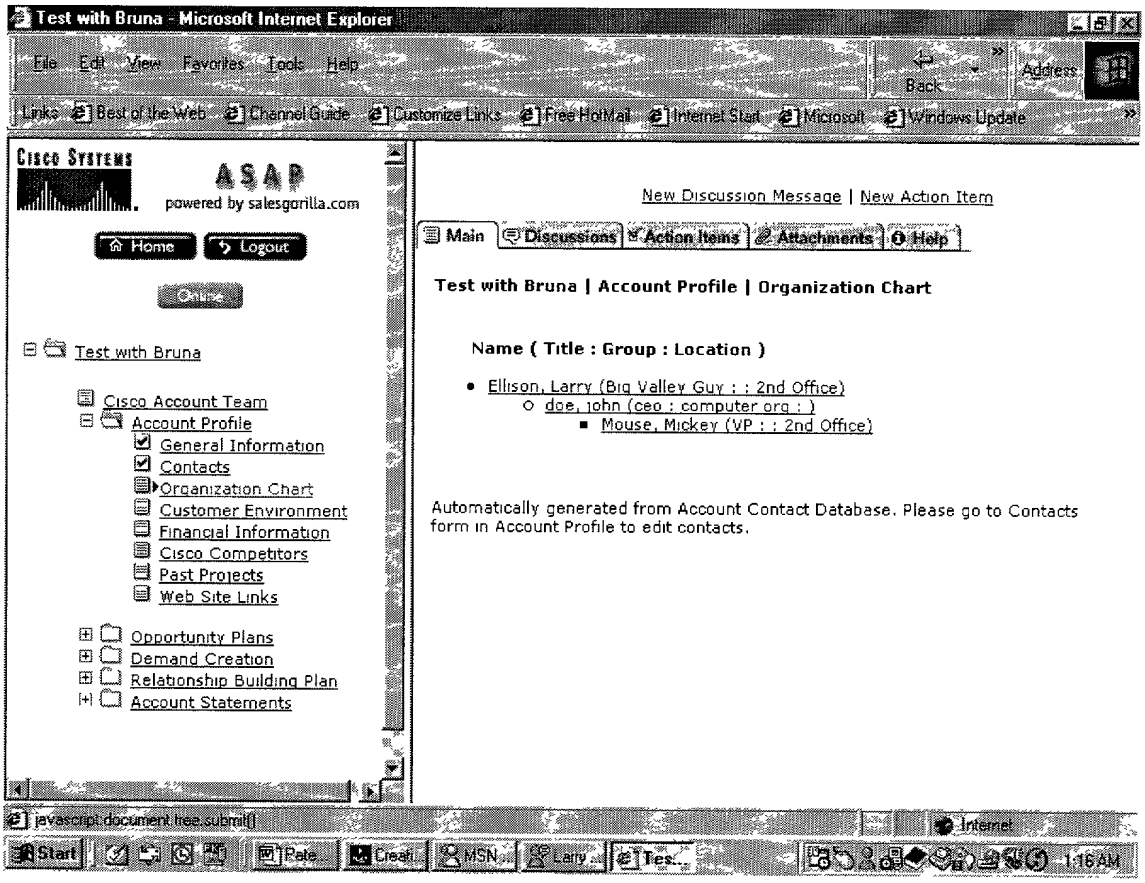

Test with Bruna - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back
Address
Links Best of the Web Channel Guide Customize Links Free HotMail Internet Start Microsoft Windows Update
Cisco Systems
ASAP
powered by salesgorilla.com
Home
Logout
Online
Test with Bruna
Cisco Account Team
Account Profile
General Information
Contacts
Organization Chart
Customer Environment
Financial Information
Cisco Competitors
Past Projects
Web Site Links
Opportunity Plans
Demand Creation
Relationship Building Plan
Account Statements
New Discussion Message | New Action Item
Main
Discussions
Action Items
Attachments
Help
Test with Bruna | Account Profile | Organization Chart
Name (Title : Group : Location)
Ellison, Larry (Big Valley Guy : : 2nd Office)
doe, john (ceo : computer org :)
Mouse, Mickey (VP : : 2nd Office)
Automatically generated from Account Contact Database. Please go to Contacts form in Account Profile to edit contacts.
javascript:document.tree.submit()
Internet
Start
1:16 AM

FIG. 8

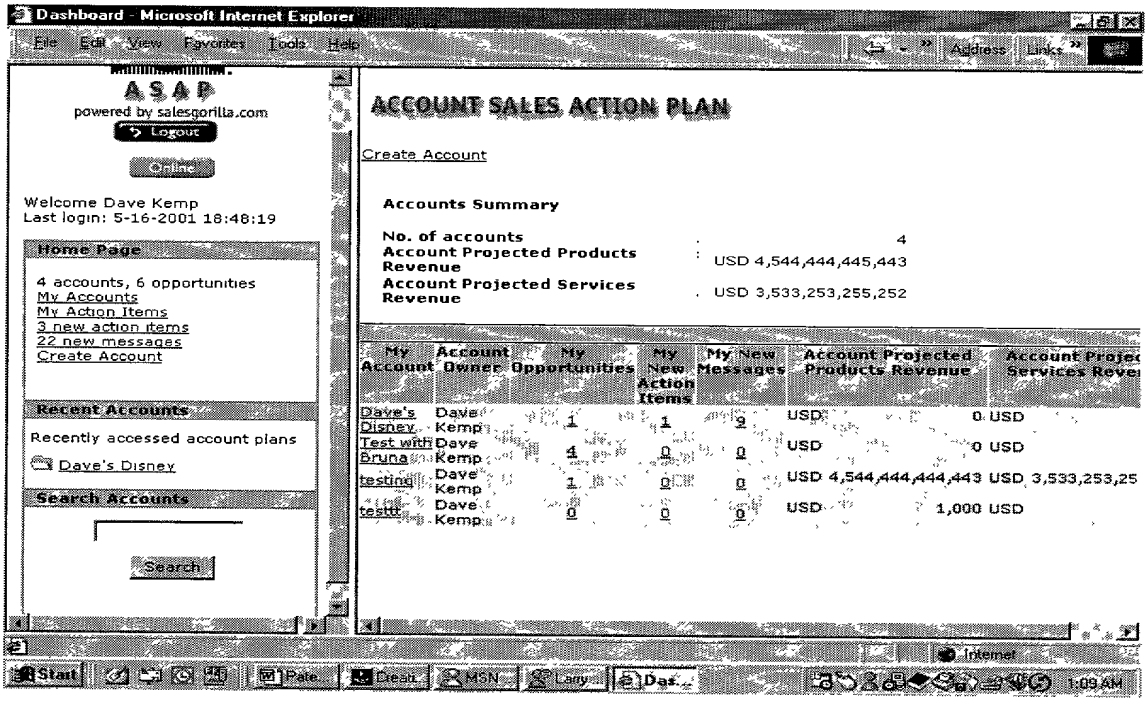

Dashboard - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Address
Links
ASAP
powered by salesgorilla.com
Logout
Online
Welcome Dave Kemp
Last login: 5-16-2001 18:48:19
Home Page
4 accounts, 6 opportunities
My Accounts
My Action Items
3 new action items
22 new messages
Create Account
Recent Accounts
Recently accessed account plans
Dave's Disney
Search Accounts
Search
ACCOUNT SALES ACTION PLAN
Create Account
Accounts Summary
No. of accounts : 4
Account Projected Products Revenue : USD 4,544,444,445,443
Account Projected Services Revenue : USD 3,533,253,255,252
My Account
Account Owner
My Opportunities
My New Action Items
My New Messages
Account Projected Products Revenue
Account Projected Services Revenue
Dave's Disney
Dave Kemp
1
1
9
USD
0 USD
Test with Bruna
Dave Kemp
4
0
0
USD
0 USD
testing
Dave Kemp
1
0
0
USD 4,544,444,444,443
USD 3,533,253,25
testtt
Dave Kemp
0
0
0
USD
1,000 USD
Internet
Start
1:09 AM

FIG. 9

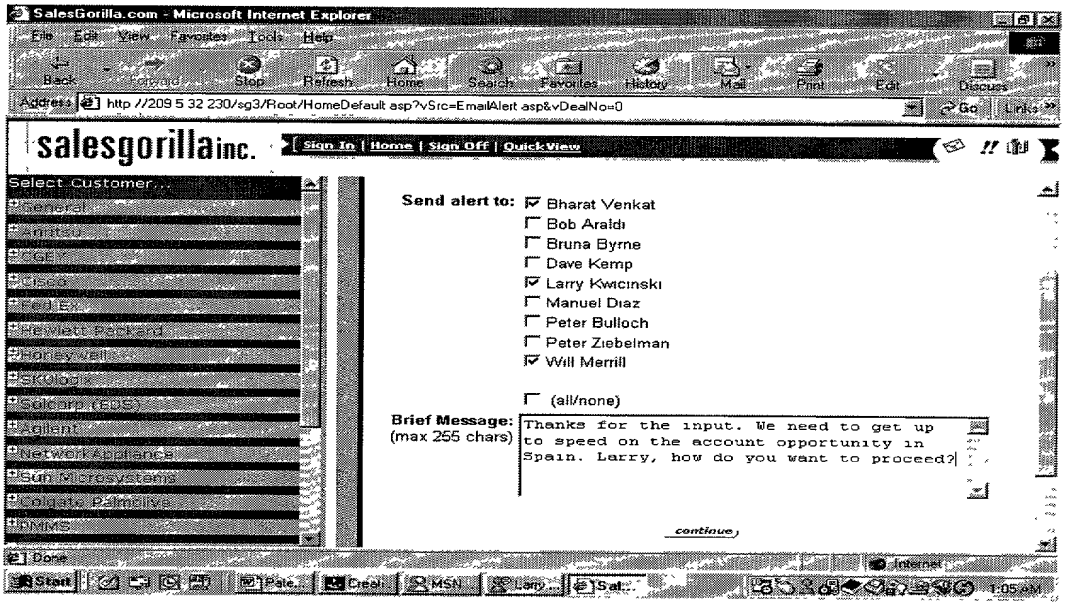
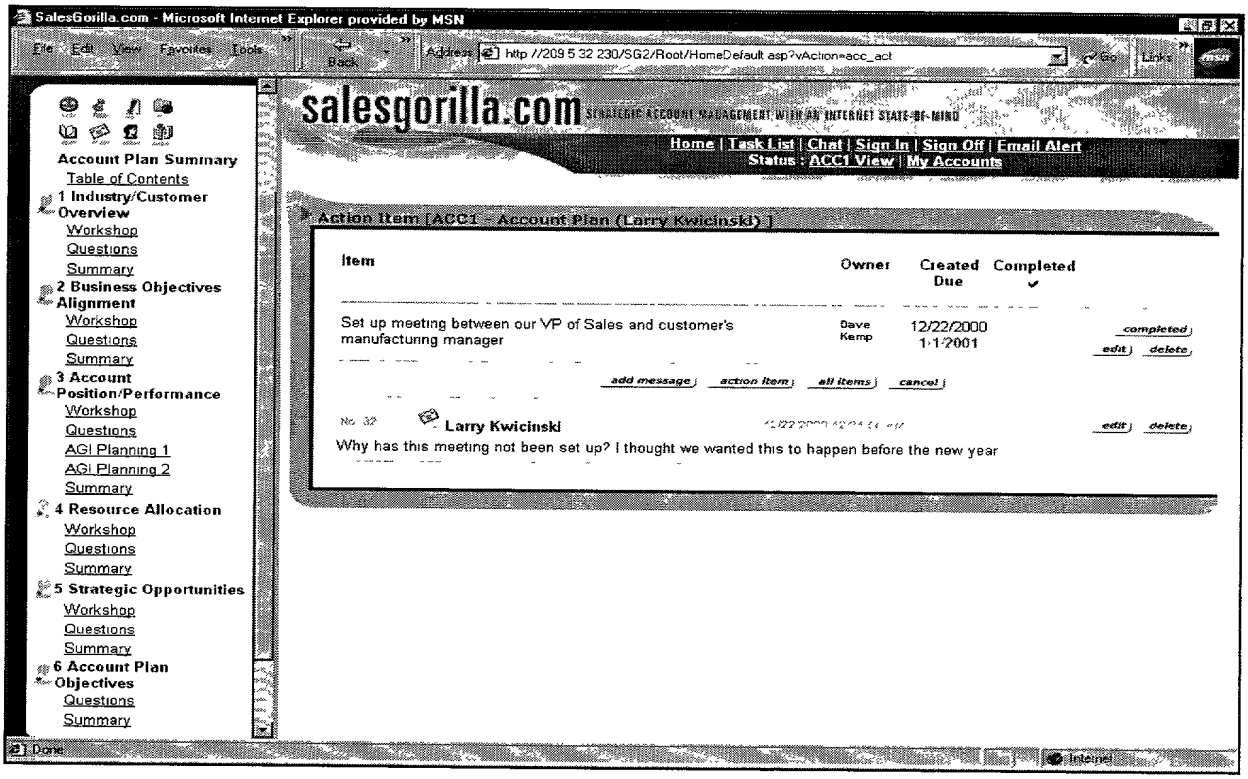

SalesGorilla.com - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Forward Stop Refresh Home Search Favorites History Mail Print Edit Discuss
Address http://209.5.32.230/sg3/Root/HomeDefault.asp?vSrc=EmailAlert.asp&vDealNo=0
salesgorillainc.
Sign In | Home | Sign Off | QuickView
Select Customer...
Send alert to:
Bharat Venkat
Bob Araldi
Bruna Byrne
Dave Kemp
Larry Kwicinski
Manuel Diaz
Peter Bulloch
Peter Ziebelman
Will Merrill
(all/none)
Brief Message:
(max 255 chars)
Thanks for the input. We need to get up to speed on the account opportunity in Spain. Larry, how do you want to proceed?
continue
Done
Internet
Start
1:05 AM

FIG. 10


SalesGorilla.com - Microsoft Internet Explorer provided by MSN
File Edit View Favorites Tools
Back
Address http://209.5.32.230/SG2/Root/HomeDefault.asp?vAction=acc_act
Links
salesgorilla.com
STRATEGIC ACCOUNT MANAGEMENT WITH AN INTERNET STATE-OF-MIND
Home | Task List | Chat | Sign In | Sign Off | Email Alert
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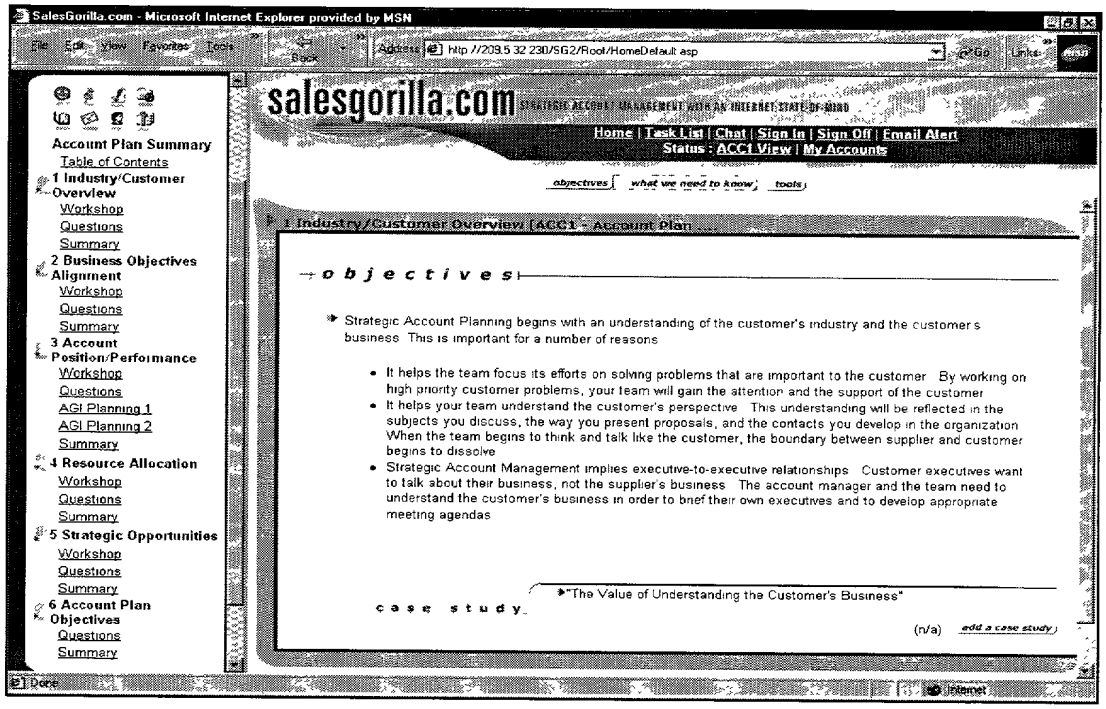
Summary
Action Item [ACC1 - Account Plan (Larry Kwicinski)]
Item
Owner
Created Due
Completed
Set up meeting between our VP of Sales and customer's manufacturing manager
Dave Kemp
12/22/2000
1/1/2001
completed
edit
delete
add message
action item
all items
cancel
No. 32
Larry Kwicinski
edit
delete
Why has this meeting not been set up? I thought we wanted this to happen before the new year
Done
Internet

FIG. 11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salesgorilla.com
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Questions
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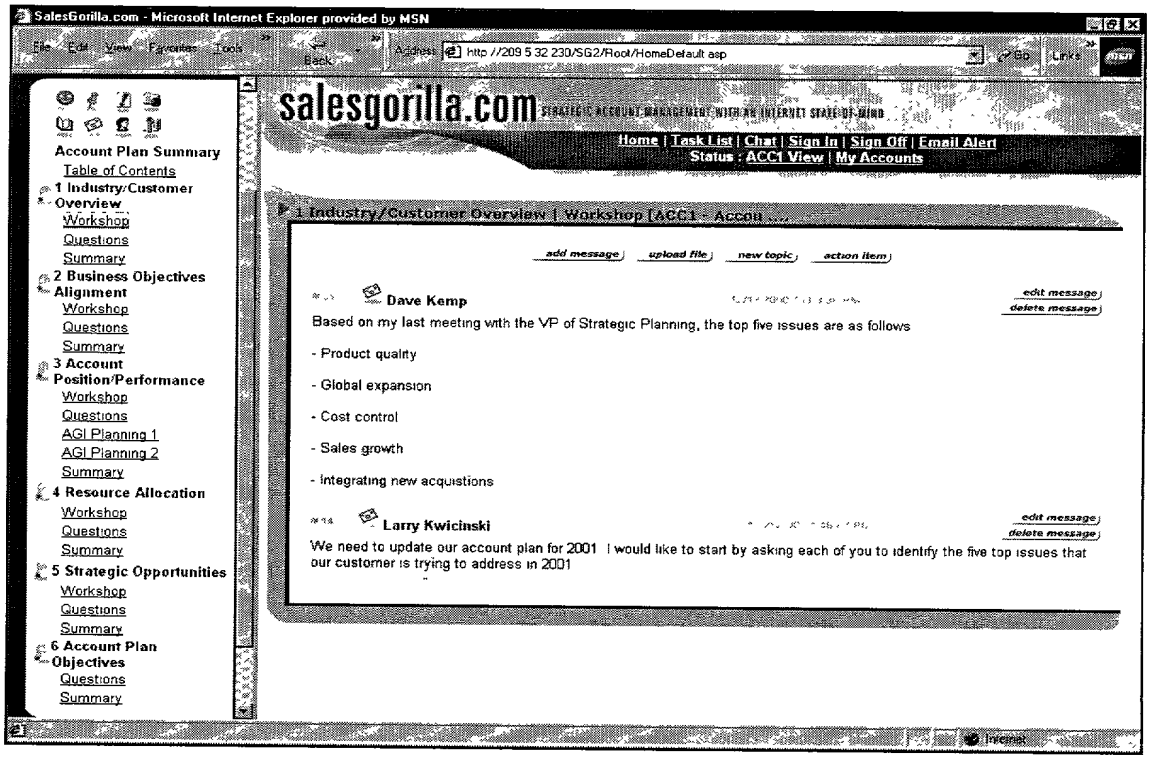
5 Strategic Opportunities
Workshop
Questions
Summary
6 Account Plan Objectives
Questions
Summary
objectives
what we need to know
tools
1 Industry/Customer Overview | ACC1 - Account Plan
objectives
Strategic Account Planning begins with an understanding of the customer's industry and the customer's business. This is important for a number of reasons
It helps the team focus its efforts on solving problems that are important to the customer. By working on high priority customer problems, your team will gain the attention and the support of the customer.
It helps your team understand the customer's perspective. This understanding will be reflected in the subjects you discuss, the way you present proposals, and the contacts you develop in the organization. When the team begins to think and talk like the customer, the boundary between supplier and customer begins to dissolve.
Strategic Account Management implies executive-to-executive relationships. Customer executives want to talk about their business, not the supplier's business. The account manager and the team need to understand the customer's business in order to brief their own executives and to develop appropriate meeting agendas.
case study
"The Value of Understanding the Customer's Business"
(n/a)
add a case study

FIG. 12


SalesGorilla.com - Microsoft Internet Explorer provided by MSN
salesgorilla.com
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Status : ACC1 View | My Accounts
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AGI Planning 1
AGI Planning 2
Summary
4 Resource Allocation
Workshop
Questions
Summary
5 Strategic Opportunities
Workshop
Questions
Summary
6 Account Plan Objectives
Questions
Summary
1 Industry/Customer Overview | Workshop | ACC1 - Accou
add message
upload file
new topic
action item
Dave Kemp
edit message
delete message
Based on my last meeting with the VP of Strategic Planning, the top five issues are as follows
- Product quality
- Global expansion
- Cost control
- Sales growth
- Integrating new acquisitions
Larry Kwicinski
edit message
delete message
We need to update our account plan for 2001. I would like to start by asking each of you to identify the five top issues that our customer is trying to address in 2001

FIG. 13

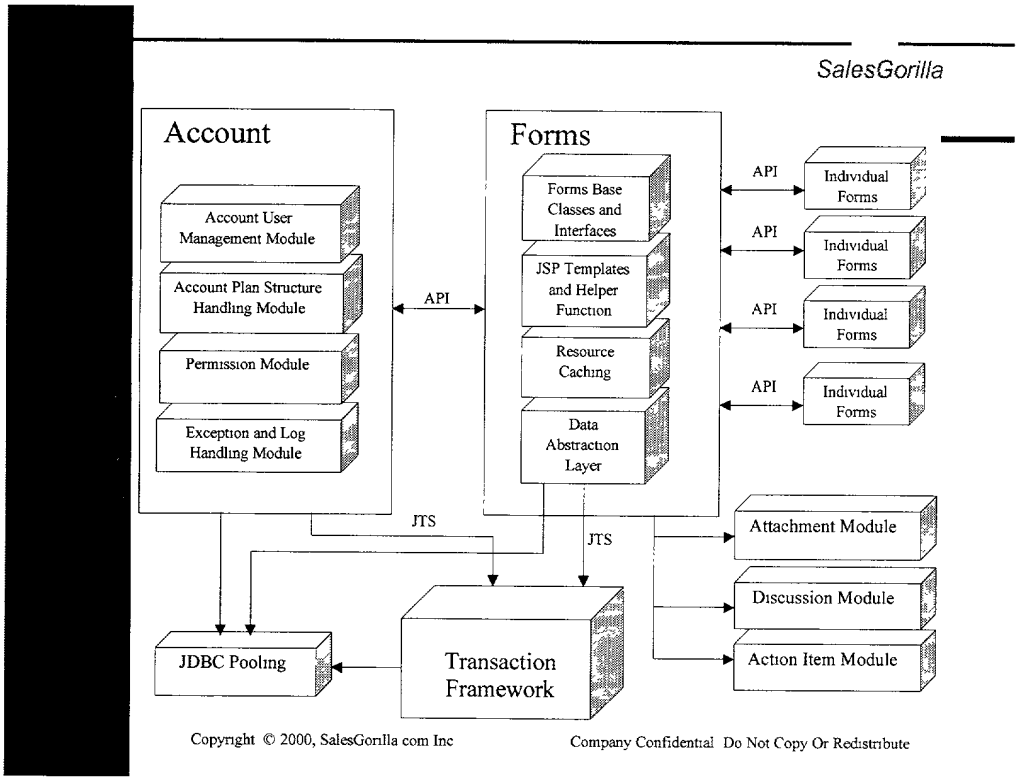
SalesGorilla
Account
Account User Management Module
Account Plan Structure Handling Module
Permission Module
Exception and Log Handling Module
API
Forms
Forms Base Classes and Interfaces
JSP Templates and Helper Function
Resource Caching
Data Abstraction Layer
API
Individual Forms
API
Individual Forms
API
Individual Forms
API
Individual Forms
JTS
JTS
Attachment Module
Discussion Module
Action Item Module
JDBC Pooling
Transaction Framework
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FIG. 14

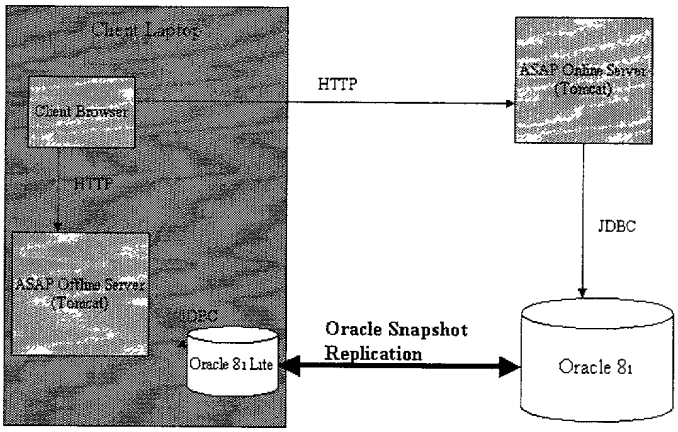

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FIG. 15

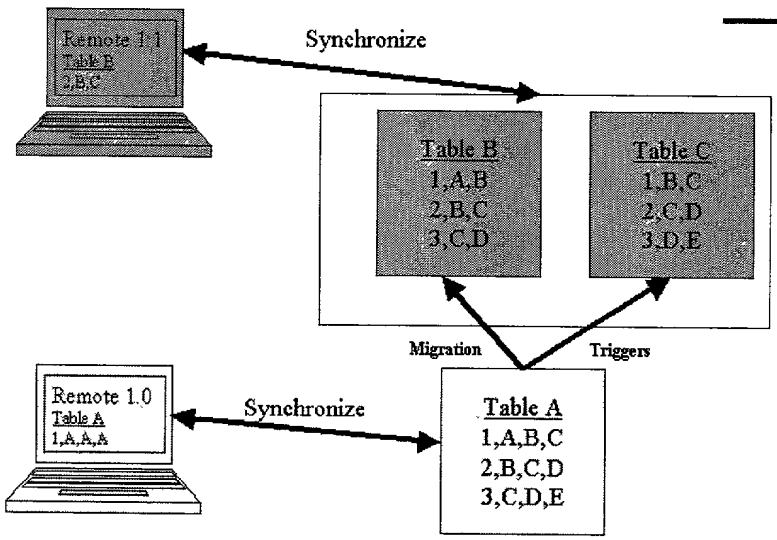

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FIG. 16

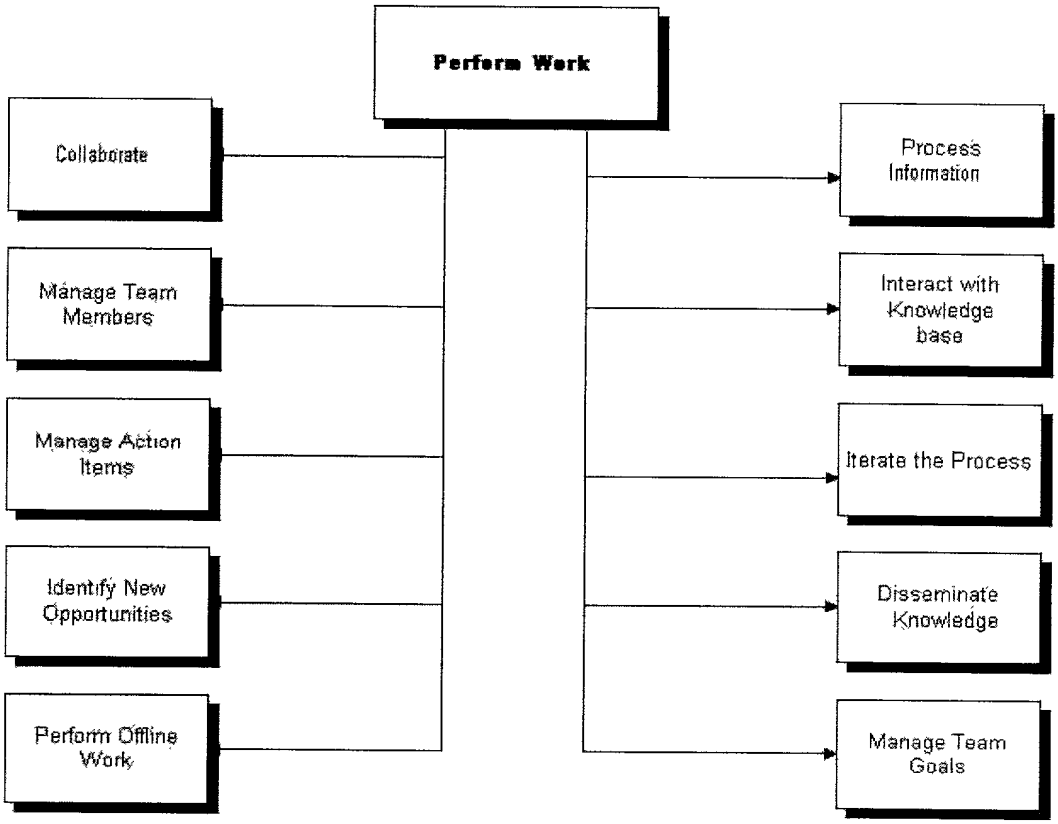
Perform Work
Collaborate
Manage Team Members
Manage Action Items
Identify New Opportunities
Perform Offline Work
Process Information
Interact with Knowledge base
Iterate the Process
Disseminate Knowledge
Manage Team Goals

FIG. 17

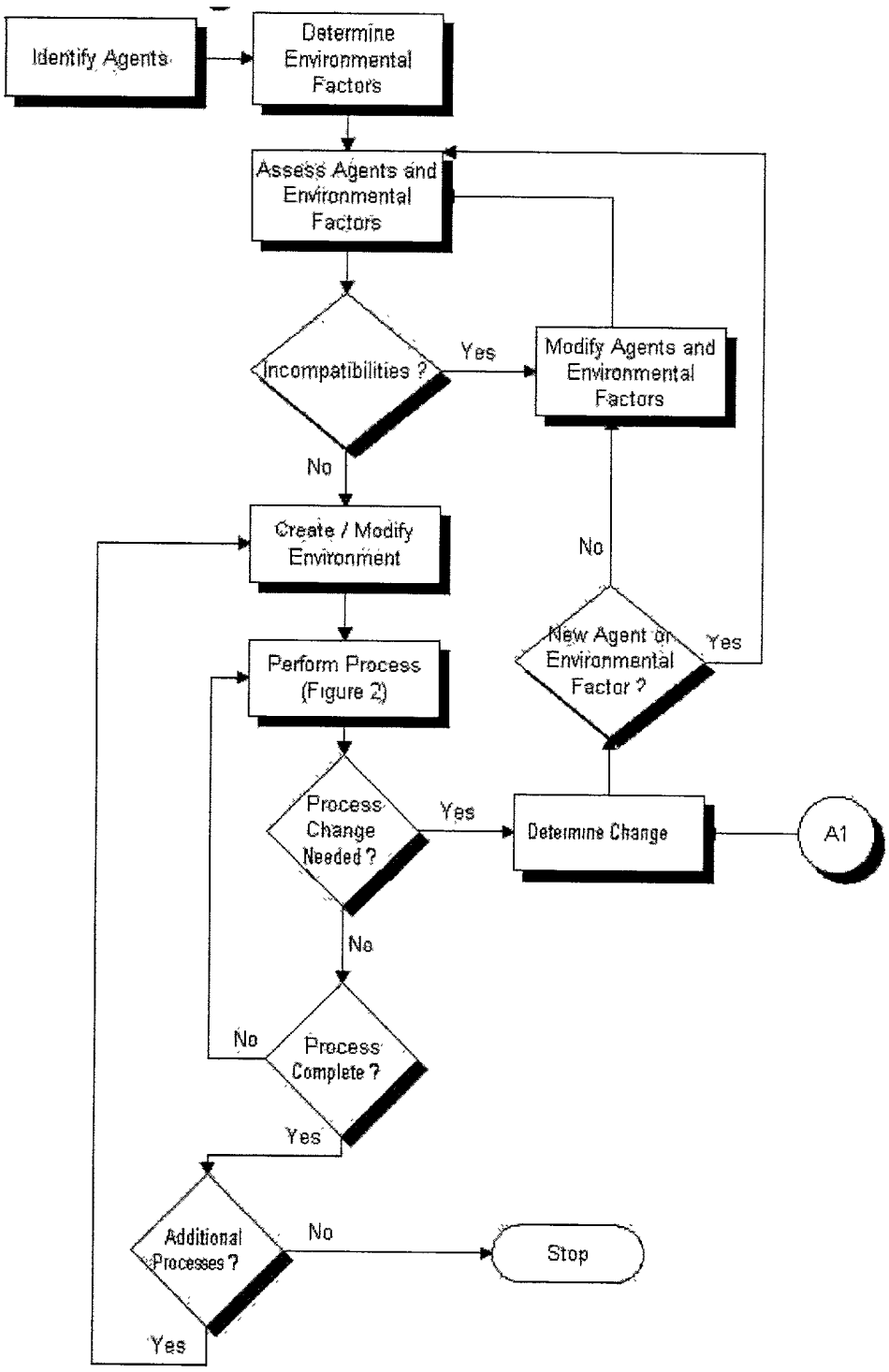
Identify Agents
Determine Environmental Factors
Assess Agents and Environmental Factors
Incompatibilities ?
Yes
Modify Agents and Environmental Factors
No
Create / Modify Environment
No
New Agent or Environmental Factor ?
Yes
Perform Process (Figure 2)
Process Change Needed ?
Yes
Determine Change
A1
No
No
Process Complete ?
Yes
Additional Processes ?
No
Stop
Yes

FIG. 18

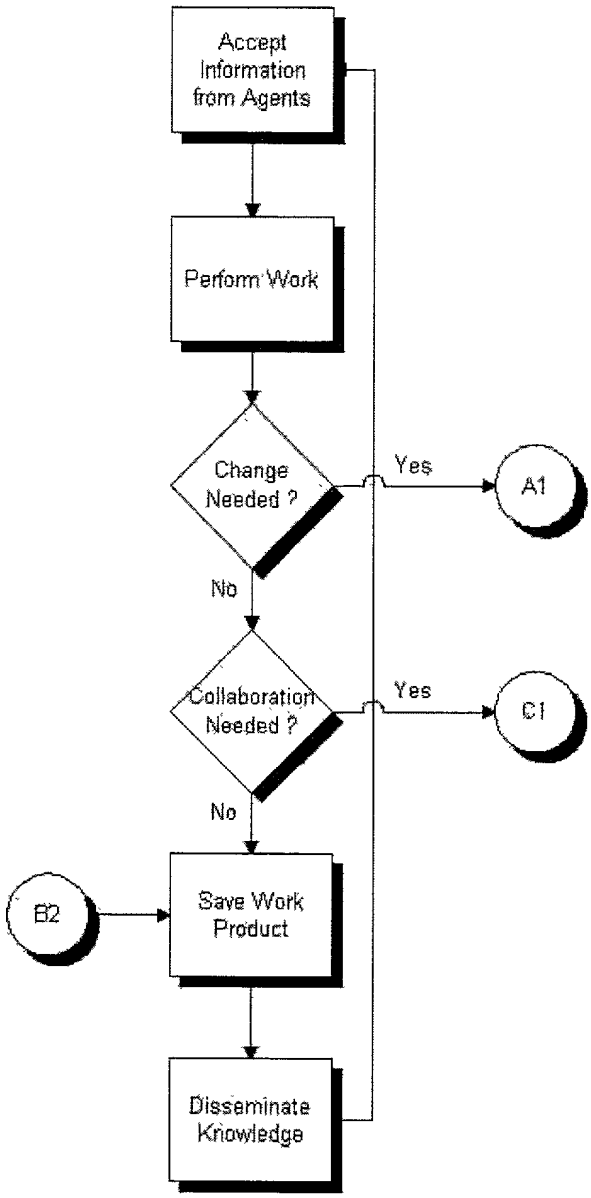
Accept Information from Agents
Perform Work
Change Needed ?
Yes
A1
No
Collaboration Needed ?
Yes
C1
No
B2
Save Work Product
Disseminate Knowledge

FIG. 19

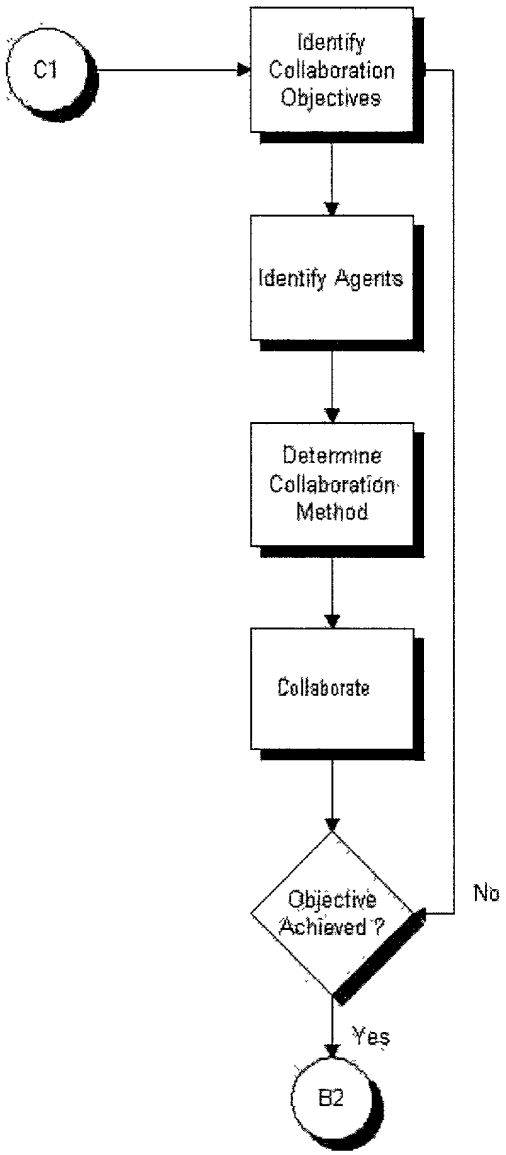

FIG. 20

FCBS0059-1.8.0.NS.SD